



## ***The City of Minneapolis' Approach to Performance Management***

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[Halogen User Guides](#)

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This document was updated on August 1, 2014. To find the lastest version or to get more information, go to [PerformMinneapolis](#) website.

## Purpose of this Document

This guide provides City employees with an introduction to **PerformMinneapolis** and a reference to its key components. Think of it as a “Quick Start” guide.

## Introduction

In 2011, the City of Minneapolis started implementing a fresh approach to performance management called *PerformMinneapolis*.

### What is it?

*PerformMinneapolis* is a way of planning and doing work with an emphasis on outcomes. It allows employees to know what’s expected of them, link their work to City and Department goals and be recognized for their accomplishments.

*PerformMinneapolis* is a *business* process, not a Human Resources process. It forms the link between planning the work (Business Planning) and the results produced (Results Minneapolis). It is the process that allows employees to turn the objectives defined in Business Planning into the achievements reported in Results Minneapolis.

### Background

In 2009, focus groups were conducted across the City with over 200 employees who were asked to identify what would make a credible performance management system. Employees said they wanted:

- Clear expectations
- A process that was fair (ratings based on overall contribution, not a single event; process for assigning a rating is clear, makes sense, and is consistently applied)
- Two-way communication and feedback
- Balanced: Linked to employee development as well as correction
- A focus on improvement
- Easy to use

The focus group responses largely agreed with the research about good performance management and helped define a 3-step performance management process along with a set of five promises.

### 3-step performance management process

1. Starts with the employee and the supervisor collaborating to **plan** work and set expectations
2. Requires both the supervisor and the employee to **monitor** or track performance during the year
3. Completes the cycle by summarizing the year’s accomplishments in a performance appraisal and **recognize** those accomplishments.

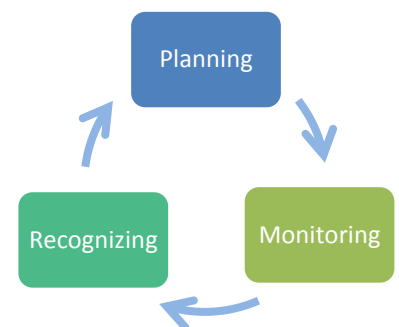
### What’s Different?

*Much more than forms*

*More than the annual Performance Appraisal*

*Happens 7 days a week, 365 days a year*

*It is a joint process between supervisors and their employees*



### ***The five promises***

1. Clear line of sight to City goals
2. Improvement focused
3. Linked to employee development
4. Outcome (results) orientation
5. Fair (process of assigning a rating is clear, makes sense, and is consistently applied)

### **Why Now?**

*The City hasn't tweaked the performance management process since 1988*

*The focus groups suggested that it was time for an update*

*The 2010 Management Practices Survey indicated that HR should give Performance Management some attention*

### ***Why now?***

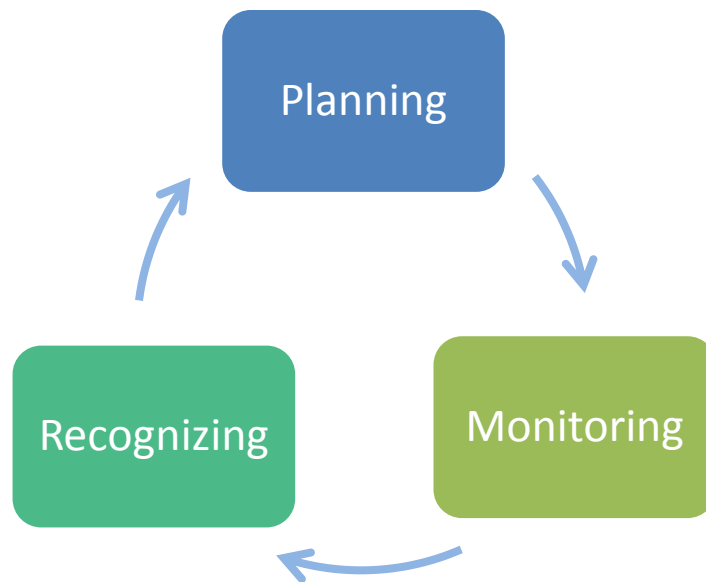
In order to be successful in the future, the City of Minneapolis must be innovative and agile, make the best use of our resources, and focus on work that makes a difference. By showing the links between individual contributions and City goals, *PerformMinneapolis* can help leadership better allocate people and resources across the City and reduce duplication of effort. That allows the City to move more quickly and efficiently on ideas and strategies. The active involvement of both employee and supervisor in the process encourages employee engagement.

### ***What's in it for employees?***

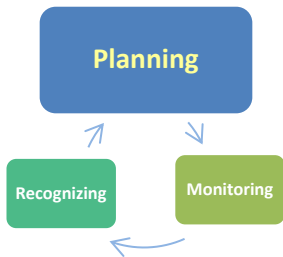
- Build supervisor-employee relationships
- Build coworker relationships
- Become more clear about what's expected of you
- See how your work matters
- Identify the resources you need to succeed
- Receive meaningful feedback and recognition
- Reduce bias in performance review
- Increase opportunities to develop and grow

## ***Performance Management Process Overview***

The performance management process is a dynamic and interactive 3-step cycle consisting of planning, monitoring and recognizing performance. Each phase of the cycle is critical to the success of an effective performance management process. Together, employees and their supervisors plan an important role in making *PerformMinneapolis* successful.



## Planning Performance



PerformMinneapolis starts with **planning**.

Planning consists of a series of conversations between supervisor and employee that result in a **set of employee work expectations** – agreement about what needs to be done and how well it needs to be done.

### About Setting Work Expectations

Working with their supervisors, employees should develop 3 - 5 work expectations. Developing work expectations is a collaborative process requiring input from both supervisor and employee. Supervisors approve work expectations.

#### Goal Setting for Supervisors and Managers

*For Supervisors one of the major job functions is "Managing employees."*

*For Managers, four major job functions are*

- *Managing operations*
- *Managing staff*
- *Managing Budget*
- *Managing Relationships – internal and external to the department*

### Employee Work Expectations Include 5 Key Parts:

1. Major Job Duties
2. Link to Department or City Goal
3. Outcomes (results)
4. Performance Standards
5. Resources Needed

#### 1. Major Job Duties:

Major Job functions are what you do as part of your job. They are

- The 1 – 5 major chunks of your job
- Your key responsibilities
- The reasons why your job exists
- What you answer in a checkout line when someone asks "what do you do?"
- Major pieces of the position description

To identify your major job duties, review your position description (be sure it's up to date and not the generic job specifications). Also review your department's business plan and identify the department goals or objectives that your work contributes to.

#### 2. Link to Department Goal

You should be able to look at your department business plan and recognize the department goal that your work links to.

### 3. Outcomes (results)

Outcomes (results) are what you produce as part of your job – what you make. They define an accomplishment, not an activity. Outcomes (results) are things: Reports, Decisions, Programs, Plans, Repairs, etc.) They can be written as a noun + past tense verb and sound like a “done deal”:

- Decision made
- Complaint resolved
- Pothole repaired

### 4. Performance Standards

Performance standards describe **how well** you need to do the job. Performance standards

- Describe the conditions that exist when the job is done in a fully successful manner (Not just “squeaking by”).
- Answer “so that...” Example: “Complaints resolved so that complaints do not escalate.”
- Are set so that if everyone performs at this level your work unit will meet its objectives.
- Establish the expectations that are later used as measures for feedback and development.

When writing performance standards

- Write them for the critical or problematic parts of the job
- Base them on
  - Historical data – historically what has been the output
  - Targets in Service Level Agreements
  - Output required to generate revenue or meet deadlines

Consider: quantity, speed, deadlines, accuracy, budget, use of resources, safety, legislative or regulatory requirements, teamwork, leadership, creativity, customer service, working with others, etc.

Don’t set performance standards based on the best performer. Generally, 80% of qualified, fully trained employees should be able to perform at the level described by the standard.

### 5. Resources Needed

Resources include whatever you need in order to succeed at your job: training, equipment, access to data, access to certain people, etc. This provides an opportunity for supervisor and employee to discuss the tools and resources needed to do the job and identify what resources are available.

Work  
Expectations  
are SMART

*Specific*

*Measureable*

*Achievable*

*Relevant*

*Time-bound*

### ***Why Setting Work Expectations is Important:***

1. Individuals and teams perform better when they have work expectations.
2. When performance expectations are set appropriately and communicated clearly, job satisfaction increases, motivation improves, and there is increased acceptance of the performance management process.
3. **Employees see how their achievements impact the organization.** Individual work expectations should link with Department and City Goals. This helps people to see the big picture, to have a clear view up and down and across the organization.
4. **There is agreement about what's to be achieved and how well it's to be done.** You achieve this through setting work expectations collaboratively. Managers who don't involve employees in drafting work expectations miss an opportunity for gaining agreement.
5. **Work expectations and development goals are often related but are different; they should be addressed independently and individualized for the performer.** Create work expectations that focus specifically on accomplishments that will impact the business. Create distinct development goals to focus on what the employee will learn. Keep these types of expectations and goals independent to make it easier to coach employees and to review and appraise their performance.
6. **Work expectations are grounded in reality.**
  - Describe achievements that are within the control of the performer.
  - To the extent possible, frontline workers should not have expectations that are made or broken by the actions of another department, unit or the general economy. A Department Leader, on the other hand, has a role that is expected to foresee problems and create contingency plans.
  - The best goals rely on performance, not on external factors.
7. **The specifics are nailed down.**
  - Describe what will be achieved with enough precision that, in the end, everyone readily agrees on the outcome.
  - At each step down the line, the goals increase in specificity. The required level of specificity depends on the maturity, capability, and level of responsibility of the performer. (More details at lower levels, for employees with less discretion; specific outcomes but fewer details about how the goal is to be accomplished at higher levels).
8. **The results can be readily measured.** Choose standards for which measurement methods and processes exist, for which the cost of measurement is not prohibitive, and for which there is shared understanding of the meaning.
9. **Results to be achieved are noted clearly in written documentation.** Work expectations describe accomplishment rather than activity. Keeping busy, even doing what seem to be the right things, won't much matter if the activity doesn't lead to desired results. Businesses are rewarded for what they deliver.
10. **There are clear time frames and deadlines stated in work expectations.** Due dates provide focus.


*Adapted from FYI for Performance Management by Eichinger, Ruyle and Lombardo*



## An example of a work expectation

**Work Expectations**

**Major Job Duty - small box, Outcomes (results) - big box**

<b>2</b> 	<b>1</b> Resolve Customer Problems
	Billing Problems resolved Customer questions answered <b>3</b>

**Performance Standards - how well I need to do my work**

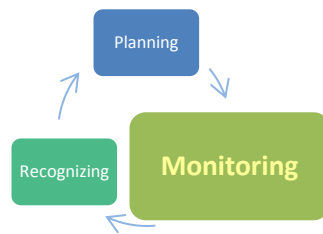
<ul style="list-style-type: none"><li>- 95% of problems do not escalate</li><li>- customer questions answered the first time</li><li>- fees on billing statements are 100% accurate</li><li>- no more than 2 complaints of merit per month</li></ul>	<b>4</b>
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**Resources - what I need to achieve this goal**

<ul style="list-style-type: none"><li>- access to database</li><li>- access to up-to-date information</li></ul>	<b>5</b>
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- 1. MAJOR JOB DUTY:** *What you do*
- 2.** A LINK to a department goal
- 3. OUTCOMES:** *What you make or produce* (Reports, Decisions, Programs, Plans, Repairs, etc.). The expected outcome or product, or of the work.
- 4. PERFORMANCE STANDARDS:** *What the accomplishment looks like when it is done in a fully acceptable manner*
  - Criteria for acceptable performance
  - How many, how well, by when?
  - Describe fully successful, not barely acceptable or really exceptional
- 5.** A set of **RESOURCES NEEDED** to do the job successfully

## Monitoring Performance



The next stage in performance management is **monitoring**.

Monitoring is the day-to-day activity of **paying attention to how the work is going**. Both supervisor and employee have a duty to track progress toward meeting the work expectations set during planning.

Supervisor and employee should have ongoing informal conversations about the work and schedule regular meetings (at least every 90 days) to discuss, progress on the work expectations, what might make it better

and how the employee could develop. Both supervisor and employee should keep notes, about accomplishments and challenges. Recording these instances creates the basis for useful feedback.

### Holding a Check-in Conversation

*In addition to the day to day feedback, have a brief dedicated discussion every 90 days about progress against work goals. Talk about any challenges, ideas, or questions that either the employee or the supervisor has. Some questions to consider:*

- *What's going well? What accomplishments are you proud of?*
- *What's becoming a challenge?*
- *Where is help needed?*  
Supervisor: how can you help employee accomplish work goal?

### Activities during monitoring

1. Review your work expectations – do you need to update? Add details? Clarify? Make sure that work expectations are still SMART (specific, measurable, achievable, relevant and time-bound);
2. Employee keeps track of his or her own work expectations and performance and records journal notes in Halogen;
3. Supervisor keeps track of employee performance and records journal notes in Halogen;
4. Supervisor provides feedback, both formal and informal;
5. Supervisor and employee have a check-in conversation to discuss progress on work expectations and what is needed to achieve work expectations;
6. Employee works with supervisor to create 1 – 3 personal development opportunities

### To view, add or edit work expectations

See [Work Expectations](#) in the Halogen User's Guide. Remember: Supervisors can always edit work expectations, but employees **cannot** unless the supervisor gives them permission.

### Journal Notes and Supervisor Notes

Employees now have a place to keep track of their own performance throughout the year: to copy an email from a satisfied customer, to make note of a challenge that came up and was resolved or to keep a record of a coaching conversation. Employees write Journal Notes about themselves. Supervisors write Supervisor Notes about their employees. Both supervisors and employees can choose to share or not share these notes. Being able to access these journal notes eliminates the scramble for outcomes (results) data, dates and comments when it's time to do an appraisal.

### To add Journal Notes or Supervisor Notes

See [Feedback](#) in the Halogen User's Guide.

### **Development Activities**

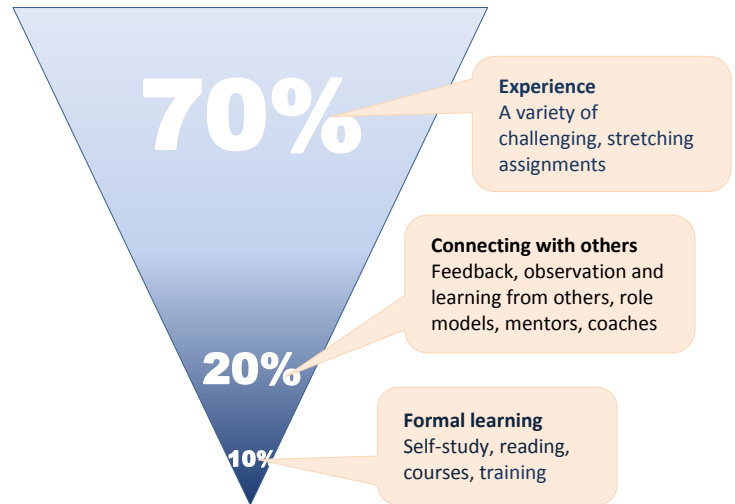
Employee development is a collaborative effort between the supervisor and the employee. It balances the employee's needs and interests with the organization's goals and objectives - a win-win situation for both.

Development involves any activity that enhances skill, knowledge, and experience. The City benefits by having knowledgeable, skilled and capable employees who serve our customers and carry out the work of the City. Employees benefit by becoming more competent, confident and better prepared to step into jobs requiring more skill or insight.

Not all training and development takes place in a classroom. Employees can develop right on the job through experiences, assignments, projects, online learning and through relationships with people including peers, coaches, mentors and bosses.

Consider the following development activities:

- Pair less skilled or experienced employees with high performers who act as their "work buddy" and guide their work, answer questions, share their knowledge/skills/experience.
- Assign a stretch goal that takes an employee just beyond their comfort zone and challenges them to try something new or different, and acquire new skills and experience.
- Assign an employee to a short term "acting role" where they temporarily take on some or all of the duties of another.
- Ask an employee to diagnose and/or suggest resolutions for a problem.
- Assign work on a cross-functional or cross-cultural team.
- Invite an employee to research emerging technology or a new trend in your field and give a presentation on their findings.
- Assign work on a high-stakes project.
- Assign work that exposes the employee to another part of the organization.
- Allow an employee to shadow another employee who is in a more senior role or in a different but complementary role.
- Invite an employee to use their core skills in a different application (for example, technical writer creating marketing materials, trainer providing technical support, etc.).
- Assign an employee to train or mentor another employee.
- Assign an employee to work with a low-performing or challenging employee.



Research by the Center for Creative Leadership tells us that up to 90% of what we need to know to do our jobs, we learn on the job.

### **To add a Development Activity**

See [Development Plans](#) in the Halogen User's Guide.

## Feedback

Feedback forms the basis for most of the activities in the Monitoring phase. To have an impact, feedback that is *given*, needs to be *received*.

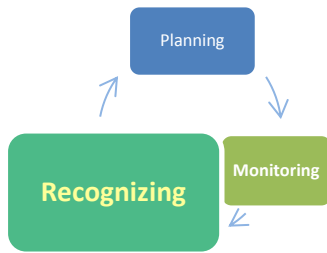
### Tips for giving feedback

- Focus feedback on the task, never on the person. Feedback directed at the person tends to decrease performance.
- Give confirming feedback to maintain performance ("You're right... Don't change") especially following successful behaviors and accomplishments.
- Give corrective feedback to change performance in desired directions. Keep the feedback tone neutral, never condemning.
- When providing confirming feedback, avoid corrective feedback and vice versa ("You're doing great, but..."). Simultaneous reception of confirming and corrective feedback tends to confuse the performer and decreases performance.
- Provide specific feedback, but not so detailed that it overloads the performer's ability to process the information.
- Provide confirming feedback either publicly or privately. Provide corrective feedback privately.
- Provide corrective feedback following behavior and accomplishment. However, this form of feedback is particularly effective if also given just prior to the next performance attempt.
- For simple tasks, give feedback immediately.
- For complex tasks, allow for some time delay before giving feedback so that the performer is in a mental state that facilitates reception and processing of the feedback information.
- Establish logical checkpoints from which performers engaged in a complex task can benefit from feedback. Don't wait until the entire task has been completed to provide feedback.
- Identify opportunities for feedback to occur naturally from the environment in addition to or as a replacement for human-generated feedback.
- Base feedback on the work expectations that were set.

### Tips for getting feedback

- **Feedback is a gift.** It is a time to learn what you are doing right and what you are doing wrong so you can be successful in your job
- **Adopt a "What can I learn from this?"** Be open to feedback.
- **Assume the feedback giver has good intentions in mind.** Believe that the giver values you and wants to improve your relationship, even if the feedback expresses temporary dissatisfaction.
- **Try to control your defensiveness.** Having to deal with defensive or justifying behavior make people hesitant to give feedback.
- **Listen to understand.** Practice all the skills of an effective listener. Use body language and facial expressions that encourage the other person to talk. Ask questions to clarify. Summarize and reflect what you hear to assure that you 'are' really hearing.
- **Try to suspend judgment.** After all, in learning the views of the feedback provider, you learn about yourself and how your actions are interpreted in the world.
- **Check with others** to determine the reliability of the feedback. If only one person believes it about you, it may be just him or her, not you.

## Recognizing Performance



The third stage of performance management is **recognizing**.

This stage includes performance appraisal but emphasizes recognition – the acknowledgement of good work.

At the end of the cycle, supervisors and employees meet to summarize accomplishments against the work expectations set at the beginning of the cycle. Because employee and supervisor agreed to the performance standards that described how well the work needed to be done, assessing performance should be more objective. The notes recorded throughout the evaluation period provide the basis for useful feedback.

Performance appraisal feedback seeks to treat employees fairly and consistently and help them understand how to be successful.

While on-going feedback is provided throughout the year, employees are formally evaluated annually. Each employee is evaluated on *what* work that they do (WORK EXPECTATIONS) and *how* they perform their work to achieve those work expectations (JOB SUCCESS FACTORS).

Recognizing performance helps complete the 3-step cycle. It flows into the Planning step when it includes setting work expectations for the upcoming year.

# Performance Appraisal

## Elements of a Performance Appraisal

There are two critical elements used for assessing performance in the City of Minneapolis. They include performance outcomes (results) which are determined through Work Expectations along with job-related behaviors which are determined through Job Success Factors.

$$\text{Overall Performance} = \text{Work Expectations} + \text{Job Success Factors}$$

*Work expectations describe what is to be accomplished while Job Success Factors describe how performance is achieved.*

## About Work Expectations

Work expectations provide clarity and direction to employees throughout the year about the expectations of their positions. In the Planning stage, employees collaboratively established 3 – 5 work expectations are with their supervisor and linked their work expectations with department goals. This helps create a more efficient workforce. Employees and supervisors also established performance standards for each work goal. A standard indicates how well or at what level the goal must be accomplished.

## How Work Expectations Are Assessed

At the end of a performance cycle, work accomplishments are measured against the work expectations set at the beginning of the cycle. Were the work expectations achieved? Why or why not? Were the performance standards met? Why or why not?

Since work expectations are operational, the rating system used is fairly straight-forward – either the goal was met or it was not met. Achievement of work expectations is appraised at one of two levels

### Meets

Generally meets or exceeds the performance standards set for this work goal. May occasionally miss a standard. Shows consistent performance during the appraisal period. Fully acceptable performance.

### Does not meet

Do not meet the performance standards set for this work goal. May occasionally meet performance standards but not consistently. Cannot be counted on to complete work assignments. Improvement is required.

An additional category of “Not Applicable” is also available. This rating should only be used when there was agreement not to work on outcomes during the evaluation period.

### **About Job Success Factors**

The City of Minneapolis has adopted a set of six City-wide performance measurements called Job Success Factors to assess employee performance. These six factors contribute to any employee's success on the job.

Job Success Factors provide structure and a common language to describe how employees behave in job-related areas.

1. Customer Focus: meets the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.
2. Functional/Technical Skills: has the functional and technical knowledge and skills to do the job.
3. Quality of Work: quality of goods and services produced in terms of errors, waste and rework required to meet performance standards.
4. Productive Work Habits: the extent to which overall work style is effective and productive in terms of using time and resources, knowing priorities, getting the work out, and following through. Follows policy and procedures. Complies with safety practices. Arrives at work as scheduled and ready to work.
5. Peer Relationships: can quickly find common ground and solve problems for the good of all; can represent his/her own interests and yet be fair to other groups; can solve problems with peers with a minimum of noise; is seen as a team player and is cooperative; easily gains trust and support of peers; encourages collaboration; can be candid with peers.
6. Self-Knowledge: knows personal strengths, weaknesses, opportunities, and limits; seeks feedback; gains insights from mistakes; is open to performance feedback; is not defensive; is receptive to talking about shortcomings; looks forward to balanced performance reviews and career discussions.

### **How Job Success Factors were selected**

*In 2012, a team of employees went through a strategic planning process to initially identify Job Success Factors. Once completed, a group of department heads comprising a Performance Management Steering Committee finalized the six Factors.*

See the [Job Success Factors - Ratings Guide](#) for descriptions of behaviors at each of the four levels.

### ***How Job Success Factors Are Assessed***

The rating system for Job Success Factors is meant to provide guidance to supervisors and employees. Job success factors are based on workplace behaviors which tend to require greater gradation when assessing. Performance for each Success Factor is appraised at one of four levels:

#### **Exceptional**

Employee frequently demonstrates exemplary performance that far exceeds requirements in this Job Success Factor. The employee makes a unique contribution that has a significant and positive impact on the success of the unit, division, department, or City. Performance is of a rare quality found only in a small percentage of people within the organization.

Generally, 5% - 7% of employees fall in this category. (The City does not use forced distribution. In other organizations using a 4-scale rating system, this is typically the percentage that falls in this category.)

#### **Exceeds**

Performance in this Job Success Factor consistently exceeds expectations in all areas of responsibility. The employee frequently goes above and beyond what is required. The employee frequently models this Job Success Factor.

Generally, 10% - 20% of employees fall in this category. (The City does not use forced distribution. In other organizations using a 4-scale rating system, this is typically the percentage that falls in this category.)

#### **Meets**

Employee consistently demonstrates solid performance in this Job Success Factor. Employee generally meets and sometimes exceeds expectations in all areas of responsibility. Fully acceptable performance.

Generally, 60% - 70% of employees fall in this category. (The City does not use forced distribution. In other organizations using a 4-scale rating system, this is typically the percentage that falls in this category.)

#### **Does not meet**

Performance in this Job Success Factor does not consistently meet requirements. Immediate improvement is required.

Generally, 5% - 7% of employees fall in this category. (The City does not use forced distribution. In other organizations using a 4-scale rating system, this is typically the percentage that falls in this category.)

### ***Reinforcing/Recognizing Good Work***

To do their best work, employees need meaningful acknowledgement in ways that have an impact, that serve to reinforce hard work and encourage continued performance.

1. **Offer sincere thanks.** Say thank you – not just the polite *thank you*, “Thank you for getting me that information,” but a *thank you* that acknowledges or gives special attention to an



employee's actions, efforts, behavior or performance. A well-deserved pat on the back, a written letter of commendation, some private or public words of appreciation and recognition can be extremely effective.

2. **Help them keep up the momentum.** A good employee will enjoy the opportunity to work on a challenging, new project. Success breeds success. Give your outstanding employees a say in where their talents will be used next. Encourage them to keep on growing.
3. **Ask for ideas.** "How can we help you do your job better?" "How could we streamline our work?" Build off skills or insights they possess to use them in other ways. Not only will you get great ideas, but you also recognize skill and ability in powerful way.
4. **Ask for help.** Asking another person for help is one of the sincerest ways to recognize their abilities and value. Ask employees for help and you show you respect their skills and you extend a measure of trust.
5. **Create informal leadership roles.** Putting an employee in a short-term informal leadership role can make a major impact. Think how you would feel if you had a boss and she said, "We have a huge problem with a customer. If we don't take care of it we may lose them. Can you grab a few people and handle it for me?" Informal leadership roles show you trust an employee's skills and judgment. The more important the task, the higher the implied praise and the greater the boost to their self-esteem.
6. **Develop them.** Mentoring, coaching, and advanced training need not be viewed merely as a means of remediating poor or deteriorating performance. Invest your developmental time and dollars in your top performers. That's the way to raise the bar, accelerate the growth of your strongest performers, and drive your organization to greater heights of success.

There are innumerable ways to recognize the efforts and accomplishments of your employees. If you're not sure what approach to take with a given employee, ask them! You will engage them in the process, demonstrate your respect, and provide them with a meaningful and impactful reward for outstanding performance.

### ***Performance Appraisals are Conducted November - January***

The City of Minneapolis uses a common review date, rather than an anniversary date, for performance appraisals. This allows the City to evaluate overall performance outcomes (results) at one set time. This process occurs during a window of time and will last up to three months, given the large number of employees in the City.

<b>Plan Performance (establish Work Expectations)</b>	<b>Monitor Performance</b>	<b>Recognize Performance (Appraisal)</b>
November – January	January – December	November - January

## ***Employees and Supervisors***

The entire performance management process depends on collaboration and ongoing conversations between employee and supervisor.

**PerformMinneapolis** requires participation by both employee and supervisor.

### ***Employee Responsibilities***

Performance management is not a spectator sport. It is not something a supervisor does *to* or *for* an employee. An employee needs to be actively engaged in monitoring and managing his or her own performance. Employees should:

- Collaborate with supervisor to identify work expectations, outcomes (results) and performance standards for the upcoming year
- Keep track of accomplishments
- Maintain notes about performance throughout the year
- Meet with your supervisor at least once per quarter to review progress against work expectations and adjust expectations if needed
- Suggest ideas on what would make achieving the work expectations more likely
- Discuss development needs with supervisor
- Complete a self-appraisal at end of a performance cycle (November – January).

The single most important relationship in performance management is the relationship between employee and supervisor.

### ***Supervisor Responsibilities***

The responsibility of leading and managing people is an awesome responsibility for supervisors. Effective and appropriate leadership and performance management skills remain key factors in determining the quality of work and employee loyalty. To be effective, supervisors should:

- Meet with an employee to identify work expectations, outcomes (results) and performance standards for the upcoming year
- Monitor employee performance, provide feedback and coaching
- Maintain notes about performance throughout the year
- Meet with the employee at least once per quarter to review progress against work Expectations and adjust expectations if needed (research suggests that meeting at least once a month is most effective)
- Discuss development needs with employees
- Conduct an appraisal discussion with each employee at end of a performance cycle (November – January)
- Acknowledge employee and team performance.